

Requesting Purchase Requisitions on the Web

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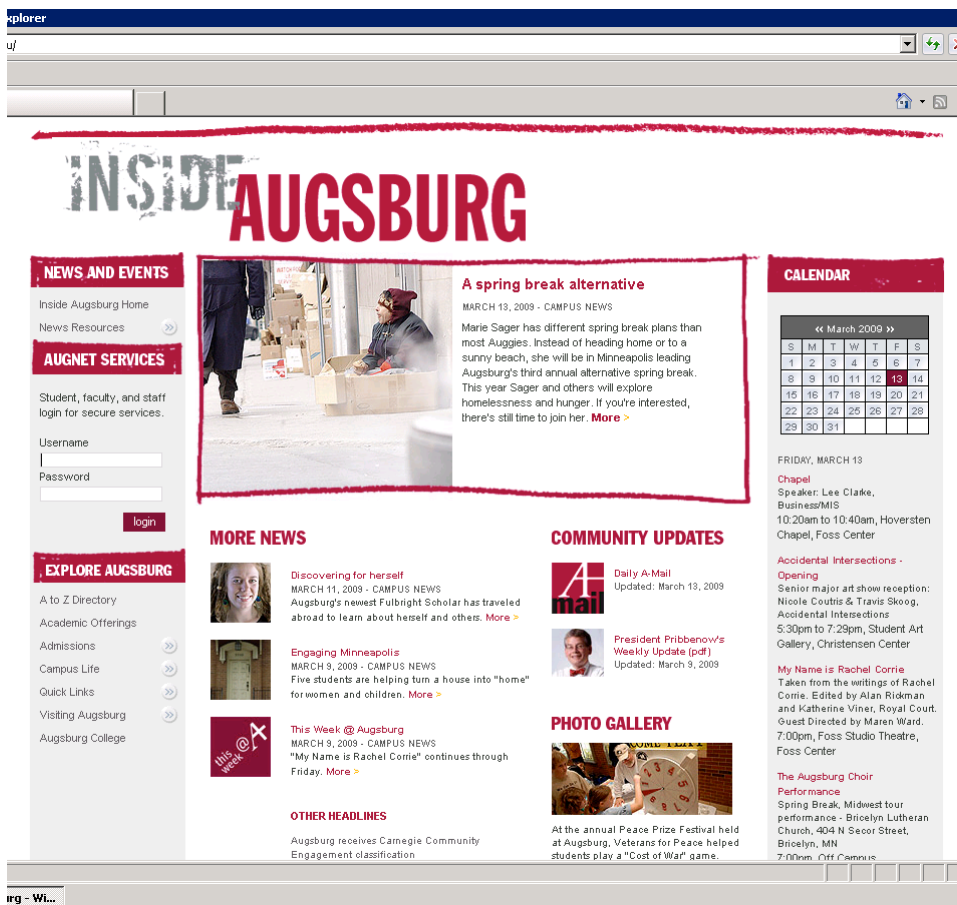
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I. Why is requisitioning moving to an online process?

- It's easier for purchasers.
- You will have better access to the status of purchase requisitions.
- It automates and speeds the purchase order process.
- It reduces paper use.
- It creates an electronic audit trail.
- It allows for better budget management.

II. Accessing the Online Requisition System

Sign into the Inside Augsburg page (<http://augnet.augsburg.edu>) with your AugNet username and password, using the login fields on the left side of the page.



Once logged in, click on **Administrative Tasks** at the left, under the “AugNet Services” heading. A menu will expand and show more options. Click on **Agresso Web**.

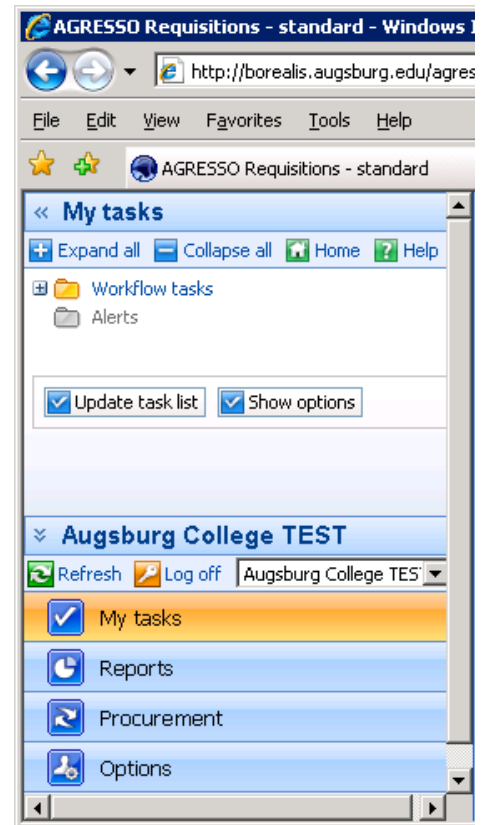
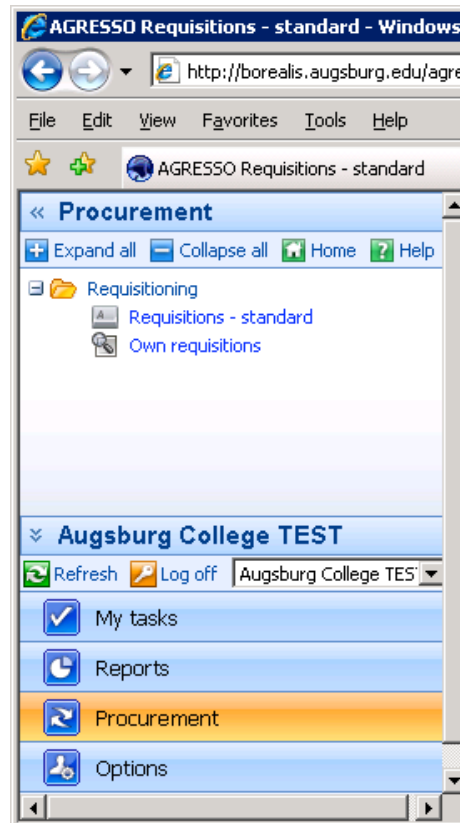
At the AGRASSO Business World screen, enter your AugNet username in the “Name” field. In the “Client” field, type “AC” (without the quotes). Enter your regular AugNet password in the “Password” field, then click the **Login** button.



The first screen in the Agresso Online system takes you to **My Tasks**. If you’re a budget manager this is where you would find tasks and requisitions to approve. (See image at right). ---->

To enter the requisitioning portion of Agresso, click on **Procurement** towards the bottom of the left-hand side. Then click on **Requisitioning** at the top of the sidebar, and then choose **Requisitions - standard**.

(See image at right).



This will bring up the requisition entry screen.

III. Creating a Requisition

1. Select the Vendor

- Click in the “VendorID” field to select it.

The screenshot shows the 'Requisition entry' screen in Internet Explorer. The browser title is 'Internet Explorer' and the address bar shows 'Default.aspx?type=topgen&menu_id=PO332'. The page title is 'Requisitions - standard (AC)'. The 'Requisition entry' form has the following fields:

- Requested by: BENSONA
- Requisitioner: Benson, Avis
- Delivery date: 3/13/2009
- * VendorID: (empty field, highlighted with a red circle)
- Funds, Grant, Endowments: 1000

Below the form is a table titled 'Requisition details' with the following columns: #, Product, Description, Unit, VendorID, Responsible, Delivery date, Qty., Price, Amount, Status. The table contains one row with the following data:

#	Product	Description	Unit	VendorID	Responsible	Delivery date	Qty.	Price	Amount	Status
1	*	*	*	*	*	3/13/2009	0.00	0.000	0.00	Active

At the bottom of the table, there are buttons for 'Add', 'Delete', 'Copy row', 'Search products', 'Search kits', and 'Components of a kit'. There is also a 'GL Analysis' link.

- Click on the blue box with dots to the right of the field. This will open another window.
- In the SEARCH criteria box type a part of the VENDOR name then click on SEARCH. This will search the requisitioning system for vendors.
- In the list of vendors, click on the Vendor that you want to purchase from. NOTE: If there are more than one entry for a vendor it is because the vendor has more than one address. If you are not sure which address is correct, choose the first one listed because that is the General Address.

** maybe insert picture of advanced search explaining wildcards, use apple example **

2. Verify the FUND field

- Press the TAB key until the “Fund, Grant, Endowments” field is highlighted.
- If you are using the operational money assigned to your Cost Center, use the default Fund code of 1000. Otherwise, enter the code for the fund that you are using to pay for the requisition.

3. Enter the product (GL code or account) for the purchase.

- Press the Tab key until the “Product” field is highlighted. (“Product” in this case does not mean the items you are ordering. Rather, it means what G/L code or account should be associated with this requisition).
- Type in your product (GL code/account) if you know it
OR
Search for the appropriate GL code/account by clicking on the blue box with dots next to the “Product” field. Click on the product (GL code/account) you are using for this purchase.

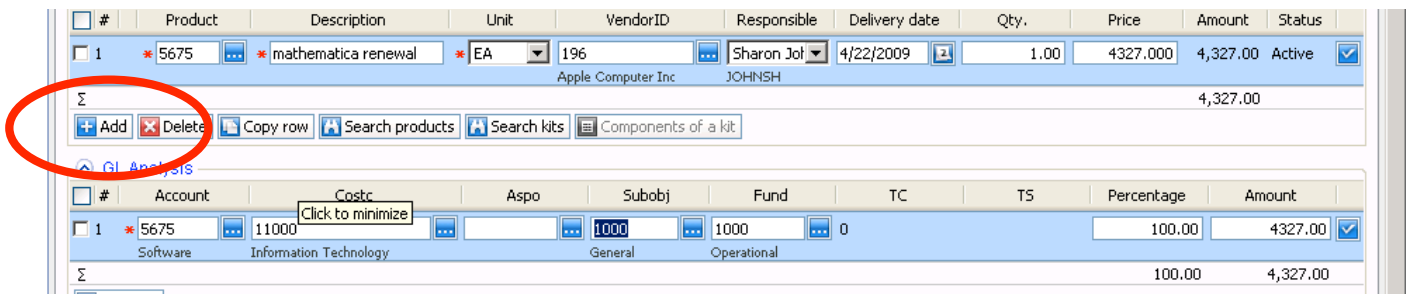
A reference list of the available product (GL/account) codes is available in Appendix A of this document.

4. Fill in information about the items you are ordering.

- A default description for the item comes up automatically in the “Description” column. *You must change this* to be a description of the item (such as a part number) so that the vendor knows what you are ordering.
- In the “Responsible” column, choose “Sharon Johnson(Purchasing Agent)” from the drop-down menu.
- In the “Qty.” (quantity) column, enter the number of that item you are purchasing.
- In the “Price” column, enter the unit price for the item.
- Press the Tab key to finish the price entry.
- The system will automatically calculate a total amount based on the price and quantity you entered. Verify that the calculated amount is what you expect.

5. Add additional items if needed.

If you are ordering more items from the same vendor, click on the “Add” button underneath the listing of items to add another line. Repeat steps 3 and 4 to fill in the information.



The screenshot shows a software interface with two tables. The top table has columns: #, Product, Description, Unit, VendorID, Responsible, Delivery date, Qty., Price, Amount, Status. It contains one row with product code 5675, description 'mathematica renewal', unit 'EA', vendor '196', responsible 'Sharon Jol', delivery date '4/22/2009', qty '1.00', price '4327.000', amount '4,327.00', and status 'Active'. Below this table is a toolbar with buttons: Add (circled in red), Delete, Copy row, Search products, Search kits, and Components of a kit. The bottom table is titled 'GL Analysis' and has columns: #, Account, Costc, Aspo, Subobj, Fund, TC, TS, Percentage, Amount. It contains one row with account '5675', cost center '11000', subobject '1000', fund '1000', TC '0', percentage '100.00', and amount '4327.00'. A tooltip 'Click to minimize' is visible over the Costc field.

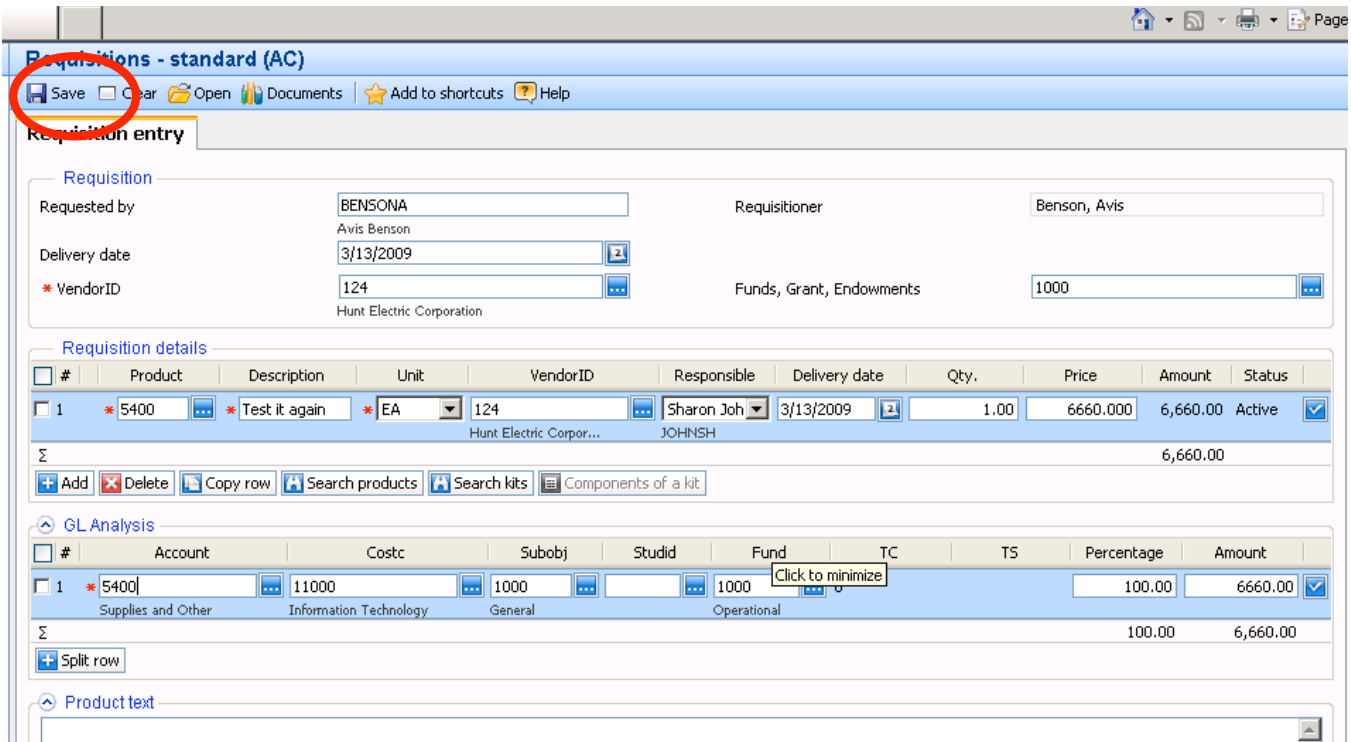
6. Specify if you would like the finished purchase order to be faxed to the vendor.

If you want the Purchasing Specialist to fax the finished PO, add another item to your order. Choose product code PLEASEFAXPO and enter the fax number in the “Description” column. Enter “0” for the price.

If you do not want the PO to be faxed, skip this step.

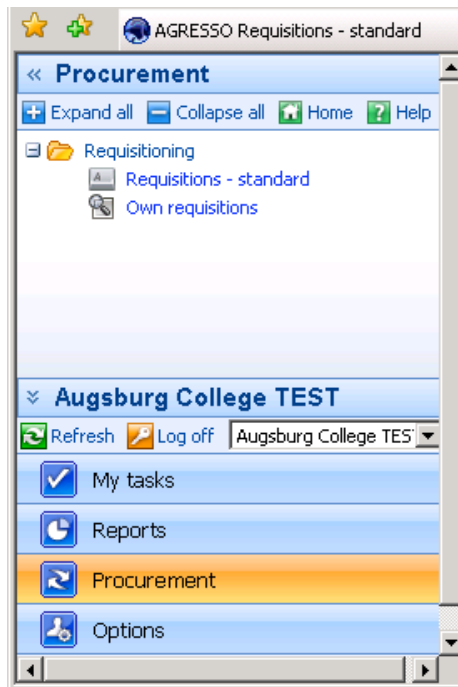
7. Verify and submit the requisition request.

- Verify that this purchase is assigned to the appropriate account, cost center, subobject and fund.
- Once everything is OK Click on **SAVE** in the upper-left corner. This submits the requisition request and generates a requisition number.
- You might want to write down the Requisition number so that you can check on the status in the future.



IV. Checking the status of requisitions

To look at where your requisitions are, access the requisition system as described in section II of this document. Once in the Requisitioning menu, choose “Own requisitions” to see requisitions you have requested.



Appendix A: Product Codes

Product Code / Description

1310 Custodial Inventory
 1340 Bus Passes
 5150 Research & Development
 5291 Marketing Advertising Project
 5301 Outside Services/Consultants Proj
 5391 Reference Materials Project
 5401 Supplies Project
 5470 Printing
 5490 Business Meeting
 5500 Dues Fees Registration
 5520 Employee Recruiting
 5550 Non Budgeted Equipment Expense
 5560 Vehicle
 5580 Facility Rental
 5600 Equipment Purchase
 5620 Equipment Repair and Maintenance
 5670 IT Computer Equipment
 5700 Building Repair and Maintenance
 5710 Contract Services Physical Plant
 5720 Minor Renovations
 5731 Construction
 5741 Maintenance Supplies Proj

PLEASEFAXPO FAX to 999-999-9999
 TRAVELAIRFRP Airfare Travel Project
 TRAVELHOTELP Hotel Travel Project
 TRAVELMEALSP Meals Travel Project
 TRAVELMILGEP Mileage Travel Project
 TRAVELOTHERP Other Travel Project
 TRAVELRENTLP Vehicle Rental Travel

Product Code / Description

1315 Plant Equip Inventory
 1345 Inventory Concessions
 5290 Marketing Advertising
 5300 Outside Services/Consultants
 5390 Reference Materials
 5400 Supplies
 5440 Communication
 5471 Printing Project
 5491 Business Meeting Project
 5501 Dues Fees Registration Project
 5530 IT Supplies
 5551 Non Budgeted Equip Expense Proj
 5561 Vehicle Project
 5590 Miscellaneous
 5601 Equipment Purchase Project
 5650 IT Leases and Contract
 5675 Software
 5701 Building Repair and Maintenance Proj
 5711 Contract Serv Phy Plant Proj
 5721 Minor Renovations Project
 5740 Maintenance Supplies
 5815 Building Rent

TRAVELAIRFAR Airfare Travel
 TRAVELHOTEL Hotel Travel
 TRAVELMEALS Meals Travel
 TRAVELMILGE Mileage Travel
 TRAVELOTHER Other Travel
 TRAVELRENTAL Vehicle Rental Travel